Introduction to MY WorkFlow

Workflow is a chronological series of tasks that the restaurant manager should be following on a daily basis. This series of tasks will help with running and managing the business more effectively. Some tasks are optional while others are mandatory to complete at either shift level or day level. If not, you will not be able to move forward in the Workflow. Every shift has a pre-defined set of tasks to complete. Some tasks must be completed before moving to the next level.

The My Workflow screen has been developed in eRestaurant as a part of the dashboard and acts as the default homepage for users. The modules within a shift have been broadly divided into five categories.

- Cash and Sales
- Forecast
- Food Management
- Labor Management
- Payroll Management

Components on the My Workflow screen

Tiles:

Current day
Previous day

Date Selection Dropdown:

Use the dropdown to go to a previous day’s workflow.

It will only allow you to go back 7 days.
Store Selection Dropdown:

Franchise Partners, District Managers, and other above restaurant users can change locations by using the next drop down.

This is not available for the restaurant level.

Last Polling Time-stamps:

In the top-middle of the screen are various read-only fields displaying time-stamps of:

- Last Cash and Sales Polling
- Last Timekeeping Polling
- Last PMix Polling

All the time-stamps will be displayed in the same time zone as the restaurant.

Icons:

On the right side of the screen are the following three icons:

- Report icon will generate the audit trail of the actions performed on Workflow.
- Add icon can be used as a shortcut to the following sections of eRestaurant:
  - Invoices
  - Inventory
  - Timekeeping
  - Cash & Sales
  - Employees
- Refresh icon will refresh the My Workflow screen to update its component if any new information/data is uploaded to the application.

Shifts:

All the tasks in the workflow will be divided into two shifts — Start of Day and Close of Day. Start of Day will mainly display tasks that contain data of the previous business day and the Close of Day shift will display tasks that contain data of the current business day. There will be a progress bar on the header of each shift which will signify the number of mandatory tasks that have been completed and pending in order to complete the shift.
Type of Tasks
The tasks on the My Workflow screen have been categorized by following ways based on their priority of completion.

<table>
<thead>
<tr>
<th>Type of Task</th>
<th>Color of Task</th>
<th>Behavior of Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optional Tasks</td>
<td></td>
<td>No hard-stop on either Shift or Day even if task is not completed</td>
</tr>
<tr>
<td>Shift Level Mandatory Tasks</td>
<td></td>
<td>Will impose a hard-stop at shift level if task is not completed</td>
</tr>
<tr>
<td>Day Level Mandatory Tasks</td>
<td></td>
<td>Will impose a hard-stop only at day level if task is not completed</td>
</tr>
<tr>
<td>Completed Tasks</td>
<td></td>
<td>Will indicate that task has already been completed or that no action is required</td>
</tr>
</tbody>
</table>

If the mandatory task are not completed you will the screen below. You must go to the previous day and complete the required task to move forward.

Tasks List by Modules
Tasks for a shift are categorized and grouped by modules under My Workflow. The following modules appear under different shifts in a day.

Cash and Sales
- **Start of Day**
  - Previous Day Cash and Sales: Displays data from the Cash and Sales object of the previous day.
- **Close of Day**
  - Review Cash and Sales: This task will display data from the Cash and Sales object of current day.

Forecast
- **Start of Day**
  - Review Forecast: This task will display the forecasted sales values of the current week.
- **Close of Day**
  - Review Forecast: The same object in Start of Day will be moved to this shift and the user has the flexibility to complete it in either shift.

Food Management
- **Start of Day**
  - Print Prep Guide: This task will display the Prep and Pull Charts of the current day.
  - Receiving: This task will display any Receiving object of the current day that is in an un-posted state.
  - Transfer In/Out: This task will display any Transfer objects from/to the store which have not been yet posted.
- **Ordering**: This task will display any Ordering objects that have not been submitted yet. It will also display orders that should be created according to Delivery Calendar but have not been created yet.

**Close of Day**
- **Waste**: Displays waste object of current date if it is in an un-posted state.
- **Receiving**: The same object in Start of Day will be moved to this shift so you can complete it in either shift.
- **Transfer In/Out**: The same object in Start of Day will be moved to this shift so you can complete it in either shift.
- **Inventory**: Displays the inventory object of the current day.
- **Ordering**: The same object in Start of Day will be moved to this shift so you can complete it in either shift.

**Labor Management**

**Start of Day**
- **Schedule**: Displays the PDF report of the Labor Scheduler of current week. Also, you can navigate to Labor Scheduler for the current week.
- **Human Resources Notif.**: Displays any notifications related to employee. For example, any un-posted Performance Review, Wage/Job Code adjustment, etc.
- **Previous Day Violation Dashboard**: Displays the list of employees who have breached any Labor Laws defined in the application till the previous day.

**Close of Day**
- **Schedule**: Displays the PDF report of the Labor Scheduler of current week. Also, you can navigate to Labor Scheduler for the current week.
- **Human Resources Notif.**: The same object in Start of Day will be moved to this shift and the user has the flexibility to complete it in either shift.
- **Violation Dashboard**: Displays the list of employees who have breached any Labor Laws defined in the application till the current day.

**Payroll**

**Start of Day**
- **Previous Day Punch Exception**: Displays all unresolved punch exceptions from the start of payroll period till previous day.
- **Previous Day Punches**: Displays the punches from previous day’s timekeeping object.
- **Previous Day Extra Pay**: Displays all Extra Pay records from the start of payroll period till previous day which have not been reviewed yet.
- **Previous Day Approaching OT Report**: Displays a report of all employees who have worked for more than 30 hours in the current week till the previous day.
- **Previous Payroll Hours**: This task will only be visible on the first day of payroll period. Displays all punches of employees from the previous payroll period.
- **Previous Payroll Summary**: This task will only be visible on the first day of payroll period. Displays summarized data of the previous payroll period.

**Close of Day**
- **Punch Exception**: Displays all unresolved punch exceptions from the start of payroll period till the current day.
- **Review Punches**: Displays the punches from current day’s timekeeping object.
– **Review Extra Pay**: Displays all Extra Pay records from the start of payroll period till the current day which have not been reviewed yet.
– **Approaching OT Report**: Displays a report of all employees who have worked for more than 30 hours in the current week till the current day.
– **Review Hours**: This task will only be visible on the last day of payroll period. Displays all punches of employees from the current payroll period.
– **Payroll Summary**: This task will only be visible on the last day of payroll period. Displays summarized data of the current payroll period.

### Actions Required Under a Task

The tasks on workflow will have a number displayed on them to denote the number of action items under that particular task.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="#" alt="Icon 1" /></td>
<td>This task contains one action item</td>
<td>Example: Inventory task will always have 1 action item as only one inventory object can be present for one day.</td>
</tr>
<tr>
<td><img src="#" alt="Icon 5" /></td>
<td>This task contains 5 action items.</td>
<td>Example: If there are 5 punch exceptions that need to be resolved, then the number 5 will be displayed in this task.</td>
</tr>
<tr>
<td><img src="#" alt="Icon Green" /></td>
<td>This task has been completed or that no action items are present under this task</td>
<td>Example: Task will automatically be marked green if there is no transfer object.</td>
</tr>
</tbody>
</table>

### Operating the Workflow

Consider the following scenario in order to understand a complete day’s walkthrough of the Workflow.

**Workflow date (current date):** 03/19/2016 (Saturday)

**Store:** 99999, Test Store

Table 4.4 lists the configuration of tasks being assumed for the purpose of this design document:

<table>
<thead>
<tr>
<th>Task</th>
<th>Task Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Day Cash and Sales</td>
<td>Shift Level Mandatory Task</td>
</tr>
<tr>
<td>Review Forecast</td>
<td>Optional Task</td>
</tr>
<tr>
<td>Print Prep Guide</td>
<td>Optional Task</td>
</tr>
<tr>
<td>Receiving</td>
<td>Day Level Mandatory Task</td>
</tr>
<tr>
<td>Transfer In/Out</td>
<td>Day Level Mandatory Task</td>
</tr>
<tr>
<td>Ordering</td>
<td>Day Level Mandatory Task</td>
</tr>
<tr>
<td>Schedule</td>
<td>Optional Task</td>
</tr>
<tr>
<td>Human Resources Notif.</td>
<td>Optional Task</td>
</tr>
<tr>
<td>Previous Day Violation Dashboard</td>
<td>Optional Task</td>
</tr>
<tr>
<td>Previous Day Punch Exception</td>
<td>Shift Level Mandatory Task</td>
</tr>
<tr>
<td>Previous Day Punches</td>
<td>Shift Level Mandatory Task</td>
</tr>
<tr>
<td>Previous Day Extra Pay (SOD)</td>
<td>Optional Task</td>
</tr>
<tr>
<td>Previous Day Approaching OT Report</td>
<td>Optional Task</td>
</tr>
</tbody>
</table>
Start of Day

When the user logs in to eRestaurant, the following screen will be displayed on the landing page.

The Start of Day shift will be displayed in an expanded view. The progress bar on the shift header will denote the number of mandatory tasks pending in the shift. As there are 6 tasks and none of them have been completed yet, the progress bar reads (0/6).

**Previous Day Cash and Sales:** User needs to click the **Previous Day Cash and Sales** task to open a pop-up under the task as shown in Figure 4.7.

![Previous Day Cash and Sales](image)

**Figure 4.7:** Previous Day Cash and Sales pop-up

**Actions:** User can perform the following actions under this object.

- Clicking Edit icon will take the user inside the cash and sales object.
- Clicking Post icon will post the receiving object and complete this task.
- Clicking Report icon will generate the cash and sales report in PDF format

Once the user has reviewed this task, the color will change from red to green indicating that the task has been completed. Then, the progress bar will read (1/6).
Review Forecast: User needs to click the Review Forecast task to open a pop-up under the task as shown in Figure 4.9.

![Figure 4.8: Progress bar status changed](image)

![Figure 4.9: Previous Day Forecast Pop-up](image)

The various data fields in this pop-up will be:

- **Days**: Displays the dates within that week.
- **Base Forecast**: Displays the base forecast for each date.
- **Mgr. Forecast**: Displays an editable field in which the manager can fill in a value in order to make adjustments to the base forecast. This field will be editable till the time actual sales for the date are not polled. After that, it will become a read only field.
- **Weather**: Displays the weather forecast for each day.

**Actions:**

- Clicking Mark as Complete icon will mark this task as complete, implying that the forecast has been reviewed.
- Once the task is made Mark as Complete from the screen, the “You’re done” icon is visible.
- Clicking Close from on the Forecast screen will take the user back to workflow.
Clicking Update icon will save any adjustments that the user has made to the **Mgr. Forecast** section.

After the task has been marked as complete, the screen will reload and the task will turn green. Also, the “Mark as Complete” icon will change to the “You’re done” icon as shown in the Figure 4.11.

The progress bar will still read (1/6) because this task, being optional, is not a part of the progress bar.

**Print Prep Guide:** User needs to click the **Print Prep Guide** task to open a pop-up under the task as shown in Figure 4.13.
The various data fields in this pop-up will be:

- **Date**: This field will display the date of the Prep & Pull Charts object.
- **Mgr. Forecast**: This will display the manager adjusted forecast value of the corresponding day.

**Actions**:

- Clicking Edit this task will take the user into the Prep & Pull charts object.
- Clicking Report icon will be used to generate PDF reports of Prep Guide.

Once the PDF icon is clicked from the screen then the task is turned green and is completed. The progress bar will still read (1/6) because this task, being optional, is not a part of the progress bar.

**Receiving**: This object will only be red if the delivery date of receiving is the current day and the object has shipped status. If these conditions are not met, this task will automatically be green. When you click on the red receiving task, a pop-up will appear under it as shown in Figure 4.15.

The various data fields in this pop-up will be:

- **Delivery Date**: Displays the delivery date which would be the current day.
- **Vendor**: Displays the name and ID of vendor.
- **PO No.**: Displays the unique PO number assigned to every order by the application.
- **Invoice**: Displays the invoice number sent by the vendor.
- **Total Amount**: This will display the total dollar amount of the items in the receiving.
- **Cases Rec.**: Displays the number of cases received in this particular receiving object.
- **Order Status**: Displays the status of order and will show shipped for an incomplete task.

**Actions:**
- Clicking Edit icon will take the user inside the Receiving object.
- Clicking Post icon will post the receiving object and complete this task.
- Clicking Report icon will generate the PDF format of the receiving object.
- The Posted icon ensures that the order has received.

Once this task is completed and posted, it will turn green. Clicking this task will reveal the same pop-up under this task with the updated Order Status as Received.

**Figure 4.16:** Receiving object turns Green and Order Status changed to Received

Order Status has changed to Received and the Post button has changed to a thumbs-up icon, suggesting the task has been completed.

The progress bar will display (2/6) now as shown in figure 4.17.

**Figure 4.17:** Progress bar status get changed

**Transfer In/Out**: This task will be red on the workflow if there is a Transfer In or a Transfer Out from the store on the current date and is in un-posted state. If not, the task will already be green.
The various data fields in this pop-up will be:

- **Date:** Displays the transfer date, which will be of the current day.
- **Transfer From:** Displays the store from which transfer is initiated.
- **Transfer To:** Displays the store to which transferred items will be sent.
- **Amount:** Displays the total dollar amount of the items transferred.
- **Submitted:** Displays the status of submission. If the order is submitted then it will show Yes, otherwise No.
- **Status:** This will display the status of the object, whether it is posted or un-posted.

**Actions:**

- Clicking Edit icon will take the user inside the Transfer object.
- Clicking Post icon will post the transfer object and complete this task.
- Clicking Report icon will generate the PDF format of the transfer object

Take a scenario where a transfer is initiated from store A to store B. The transfer object will be in red color on the workflow of store A and store B both. Now, when the user at store B posts the transfer object, the task will become green at both the stores because both stores are dealing with the same transfer object.

After the transfer object is posted, the icon will turn green and the progress bar will display (3/6).

**Ordering:** This task will be in red color under two conditions. First, an order in the current date is in suggested state, which means it has not been submitted yet. Second, order has not been created yet according to the delivery calendar sent by the concerned vendor to that store.
Clicking the task will open the pop-up as shown in Figure 4.20.

![Figure 4.20: Ordering pop-up](image)

The various data fields in this pop-up will be:

- **Vendor**: Displays the ID of the vendor.
- **Delivery Schedule**: Displays the date and time-stamp till which the order has to be submitted.
- **Order Date**: Displays the date on which the order has to be created.
- **Order Status**: Displays status of the order object and will be blank if order is not created yet.
- **Amount**: Displays the total dollar amount of the ordered items and will be blank if order is not created yet.

**Actions:**

- Clicking the Edit icon will create the Order object and take the user inside that object. The user will make required changes and then save and close the object bringing them to the workflow.

Once the order has been created and submitted, the task will turn green and the progress bar will display (4/6).

![Figure 4.21: Progress bar status changed](image)

**Notes**

This icon will remain Red only till the time the order should have been submitted. For example, if according to the delivery calendar, the order should have been submitted by 02:00 PM in current day, and the store manager does not create/submit the order till this time, the task will turn to green and the delivery schedule will not appear on the list. The Delivery calendar if setup for a vendor will show the task until the date and time has passed and it defaults to next 7 days delivery schedule to be displayed for the Store and vendor.
**Schedule:** This task will be an optional task in the workflow. It will correspond to the Labor Scheduler object of the current week. If the LS object of current week is not created, this task will be already green. The pop-up shown in Figure 4.22 will appear when the user clicks on the task.

![Schedule Pop-up](image)

The various data fields in this pop-up will be:
- **Date:** Displays the current date.
- **Mgr. Forecast:** Displays the manager adjusted forecast of the corresponding date.
- **Sch Hrs:** Displays the total scheduled hours based on the day’s forecast.
- **Proj. Hrs:** Displays the total projected hours based on the day’s forecast.
- **Act. Hrs:** Displays the actual hours of the day based on the timekeeping data.
- **Ideal Hrs:** Displays the total ideal hours based on the day’s forecast.

**Actions:**
- Clicking the “Mark as Complete” icon will mark this task as complete, implying that the task has been reviewed and the icon changes to “You’re done” as shown in the screenshot below.

![Icon changes to You’re done](image)

- Clicking the Edit task will take the user into Labor Scheduler object.
- Clicking the Report icon will be used to generate the labor scheduler report in PDF format as shown in Figure 4.24.

![Daily Crew Schedule Report](image)
Once the task has been reviewed, the task will turn green but the progress bar will not change as the task is optional.

**Human Resources Notif.:** This task is an optional task in the workflow. It displays notifications that are generated because of pending actions in HR module or due to change in any Labor Laws. Clicking on this task will display the following pop-up.

The various data fields in this pop-up will be:
- **Notification Category:** Displays the category of notification like HR Module or Labor Laws.
- **No. of Reminders:** This will display a link to the notification panel.
- **No. of Past Due:** This will display a number if an action is pending past the due date.

**Actions:**
- Clicking the “Mark as Complete” icon will mark this task as complete, implying that the task has been reviewed and the icon changes to “You’re done.”
Once the task has been reviewed, the task will turn green but the progress bar will not change as the task is optional.

![Figure 4.28: Human Resources icon turn Green and Progress bar remain same](image)

**Previous Day Violation Dashboard:** Displays a report which will give the details of all employees who have breached any labor law defined at the Org level within that week. If no employee has breached any labor law, this task will already be green. Clicking this task displays the screen as shown in Figure 4.29.

![Figure 4.29: Employee Violation Dashboard Screen](image)

The various data fields in this window will be:

- **Employee Number:** Displays the GEID of the employee.
- **Employee Name:** Displays the employee’s first name and last name.
- **Total Hours:** Displays the total hours worked by the employee in that week.
- **Normal Hours:** Displays the total normal hours (not OT hours) worked by the employee in that week.
- **OT Hours:** Displays the total overtime hours worked by the employee in the week so far.
- **Actual:** Displays the actual punch of the employee in the current day’s timekeeping.
- **Schedule:** Displays the scheduled hours of employee for current day and will be blank if employee is not scheduled.
Note

The columns with colored marks depend on the laws defined at the Org. The green mark represents that the employee has not breached that particular law. The yellow mark in Previous Day Approaching OT Report represents that the employee has worked for more/less than 30 hours in the week and is close to breaching the OT mark. The red mark represents that the employee has breached that particular law.

Actions:

- Clicking the Mark as Complete icon will mark this task as complete, implying that the task has been reviewed and the icon changes to You’re done.

![Employee Violations Dashboard]

**Figure 4.30:** Icon changes to You’re done

Once the task has been reviewed, the task will turn green but the progress bar will not change as the task is optional.

![Start of day]

**Figure 4.31:** Progress bar Status remain same as task is optional

**Previous Day Punch Exception:** This task will be displayed as red if there is any unresolved punch exception in that pay period from the start of pay period till the previous day.
There are four types of punch exceptions as follows.

- **Open Punches**: When the Clock Out time of an employee is not polled into the application.
- **Mismatch Punches**: When the timecard or job code of the employee does not match with the corresponding fields in the polled data.
- **Overlap Punches**: When a manual and a POS punch of the same employee have overlapping times.
- **Long Hour Shift**: When an employee’s punch exceeds 10 hours in one day.

The following pop-up will appear when the user will click this task.

![Payroll pop-up](Image)

**Figure 4.32**: Payroll pop-up

**Resolving Open Punches**

![Open Punches Screen](Image)

**Figure 4.33**: Open Punches Screen

User can resolve open punch by clicking the name hyperlink as shown in the Figure 4.33. Clicking the hyperlink will open the punch detail (See Figure 4.34)

![Edit open punches of an Employee](Image)

**Figure 4.34**: Edit open punches of an Employee
Through the Punch Detail screen, user can resolve the open punch by filling out the Clock Out time and update the punch. Open punches can also be resolved automatically if the store file containing the clock out time of a punch is polled into the application.

Once the punch has been resolved, the number of punch exceptions count will be reduced by 1.

**Resolving Mismatch Punches**

![Mismatch Punches Screen](image)

User will be required to click the **Timecard Number** hyperlink in order to resolve the punches. Clicking the hyperlink will open the following detail pop-up.

![Pop-up Message](image)

Here, the user can either mark the punch as invalid which will remove the punch exception or she/he can search for the employee’s record and make the appropriate changes in HR Module to find a match for this punch.

**Resolving Overlap Punches**
User will be required to click the Timecard Number hyperlink in order to resolve the overlap punches. Clicking the hyperlink will open up the following detail pop-up.

From this pop-up, the user will have to either choose the POS punch as the correct punch, or the manual punch as the correct punch by adjusting the time in such a way that it does not overlap with the POS punch.

After making the required modifications, the user will need to click the Resolve Overlap Punch button which will resolve the overlap punch and reduce the number of punch exception by 1.

Resolving Long Hour Shift Punches
The user only needs to validate the long shift punch which will resolve the punch exception.

Once all the punch exceptions have been resolved by the user, the task will be marked as complete and the icon color will turn to green. The progress bar will now display (5/6).

**Figure 4.40:** Previous Punch Exceptions icon turns Green and Progress bar status changed

**Previous Day Punches:** This task will display all the punches of the previous day’s timekeeping object. If the previous day’s timekeeping object has not been created, the task will remain in green color.

In order to complete this task, user needs to review the punches and take corrective actions. Once done, user can complete the task by clicking the icon Mark as complete as shown in Figure 4.41.

**Figure 4.41:** Previous Day Punches Screen

The description of the icons displayed on the above window is given as follows.

- Clicking the Mark as Complete icon will mark this task as complete, implying that the task has been reviewed and the icon changes to You’re done.
Clicking the Print icon will generate a PDF report of the punches.

Clicking the Add Punch icon allows users to add a new punch in the previous timekeeping.

- User can enter the relevant details in the above window to add a new punch.
- Once the task gets completed, the color of the icon will turn Green.
Technically, the shift has now been completed and the user can move on to the next shift to complete other tasks as all the mandatory tasks of this shift are complete. This can be validated by the progress bar which will be complete and display 6/6 now which states out of 6 Mandatory tasks, all have been completed.

**Previous Day Extra Pay**: This task displays all extra pay records from the start of the payroll period till the previous date which have not yet been reviewed by the user (See Figure 4.45).

Clicking this task will display the following window.

![Previous Day Extra Pay Screen](image)

**Actions:**

- Clicking the Mark as Complete icon will mark this task as complete, implying that the task has been reviewed and the icon changes to You’re Done.

![Icon changes to You're done](image)
Clicking the Print Icon will generate a PDF report of the extra pay records.

Clicking the Add Extra Pay icon will allow user to add an extra pay record.

User can also click the employee name hyperlink as shown in figure 4.39 to edit the already added extra pay record as shown in figure 4.47.

![Edit Extra Pay Screen](image)

**Figure 4.47:** Edit Extra Pay Screen

Here, the user can change the extra pay type, edit the total hours and update the extra pay record, or the user can delete the record from the **Delete Extra Pay** button.

Once the task has been marked as complete, the icon will turn green.

![Review Extra Pay Icon turns Green and Progress bar status changed](image)

**Figure 4.48:** Review Extra Pay Icon turns Green and Progress bar status changed

**Previous Day Approaching OT Report:** This task will display the details of those employees who have worked for more than 30 hours in the current week (See Figure 4.49).
Clicking this task will display the following report.

Figure 4.49: Approaching OT Alert Report

Actions:

- **Mark as Complete** icon will mark this task as complete, implying that the task has been reviewed and the icon changes to You’re Done.

Figure 4.50: Icon changes to You’re done

- **PDF icon** will generate PDF format of the same report. Once this task has been completed, the color of the icon will turn green.
The above screenshot signifies that all the tasks in the first shift have been completed and the user can move on to the next shift now.

The screenshot shown below also signifies that all mandatory tasks have been completed and the user can move on to the next shift, as the tasks which are pending are optional tasks and will not apply a hard stop on the user from moving forward.

Note that, in both the screenshots, the progress bar is complete which determines the completion of a shift.
Close of Day

Figure 4.53: Close of Day Shift

Review Cash and Sales: This task displays the Cash and Sales object summary of the current day. Clicking this task will open the following window.

Figure 4.54: Review Cash and Sales Pop-up

Following are the data fields in this pop-up.

- **Date:** This field will display the date of the cash and sales object.
- **Total Sales:** This will show the total sales for the current day.
- **Transactions:** This shows the total number of transactions for the current day.
- **Status:** This shows whether the cash and sales object is Posted or un-posted.

Actions:
The user can perform the following actions under this object.

- Clicking the Edit icon will take the user inside the cash and sales object.
- Clicking the Mark as Complete icon will Review the cash and sales object and complete this task.
- Clicking the Report icon will generate the cash and sales report in PDF format.
Once the user has reviewed this task, the screen will reload and the color of the task will turn green, indicating that the task has been completed and the icon changes to You’re Done.

<table>
<thead>
<tr>
<th>Date</th>
<th>Total Sales</th>
<th>Transactions</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/04/16</td>
<td>$4,991.56</td>
<td>334</td>
<td>Posted</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 4.55:** Icon changes to You’re done

The progress bar will read (1/8) now (as shown in Figure 4.56)

**Waste:** This object is displayed in red if there is any Waste object in the current date which is not posted yet. Clicking this object will display the following window.

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/26/2016</td>
<td>$8.16</td>
<td>Unposted</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 4.57:** Waste Pop-up

Following are the data fields in this pop-up.

- **Date:** Will display the date of the waste object.
- **Amount:** Will display the total dollar amount of the items in the waste object.
- **Status:** Will display the status of the waste object, whether it is posted or un-posted.

**Actions:**

- Clicking the Edit icon will take the user into Waste object.
- Clicking Post icon will post the transfer object and complete this task.

Clicking the Report icon will generate a PDF format of the waste object.

Completing i.e. posting this task will turn the color of the task to green and the progress bar will display (2/8) (as shown in Figure 4.58).

![Figure 4.58: Progress bar status changed](image)

**Receiving:** This task will be displayed in red in following two cases.

- If the task is not completed in the first shift, then the task will automatically move to the next shift as it is a day level mandatory task.
- If the task was already completed in the first shift, but one more receiving is taken at the store sometime later in the current day, then this task will be marked as red again.

Clicking this task will display the following pop-up.

![Figure 4.59: Receiving Pop-up](image)

Following are the data fields in this pop-up.

- **Delivery Date:** Will display the delivery date, which would be the current day
- **Vendor:** Will display the name and ID of vendor
- **PO No:** Will display the unique PO No. assigned to every order by the application
- **Invoice:** Will display the Invoice No. sent by the vendor
- **Total Amount:** Will display the total dollar amount of the items in the receiving
- **Cases Rec:** Will display the number of cases received in this particular receiving object
- **Order Status:** Will display the status of order. Will be shipped for an incomplete task.
**Actions:**

- Clicking the Edit icon will take the user inside the Receiving object.
- Clicking the Post icon will Post the receiving object and complete this task.
- Clicking the Report icon will generate the PDF format of the receiving object

Once this task is completed and posted, it will turn green. The progress bar will display (3/8) now.

![Figure 4.60: Receiving icon turns Green and Progress bar status changed](image)

**Transfer In/Out:** This task will be displayed in red in the following three cases.

- If the task is not completed in the first shift, then the task will automatically move to the next shift as it is a day level mandatory task.
- If the task was already completed in the first shift, but one more Transfer is initiated from the store or taken at the store sometime later in the current day, then this task will be marked as red again.
- There is a third case in which this task will appear as red, which is if the user manually un-posted the same object that was posted in the first shift. In this case, the workflow will read the status of the object and if it finds the object is un-posted, the transfer task will be red again. This logic applies to all tasks that have to be posted, like Inventory, Receiving and Waste.

Assuming that the user has un-posted the transfer object which was completed in the first shift.

![Figure 4.61: Transfer In/Out pop-up](image)
Following are the data fields in this pop-up.

- **Date:** Will display the transfer date, which will be the current day
- **Transfer From:** Will display the store from which transfer is initiated
- **Transfer To:** Will display the store to which transferred items will be sent
- **Amount:** Will display the total dollar amount of the items transferred
- **Submitted:** Will display the status of submission. If the order is submitted then it will show Yes, otherwise No
- **Status:** Will display the status of the object, whether it is posted or un-posted.

**Actions:**

- Clicking the Edit icon will take the user inside the Transfer object.
- Clicking the Post icon will Post the transfer object and complete this task.
- Clicking the Report icon will generate the PDF format of the transfer object

After the transfer object is posted, the icon will turn green and the progress bar will display (4/7).

**Ordering:** This task will be displayed in red in the following two cases.

- If the task is not completed in the first shift, then the task will automatically move to the next shift as it is a day level mandatory task.
- If the task was already completed in the first shift, but one more Order is created by the user and left in an un-submitted stage in the current day, then this task will be marked as red again.

Clicking the task will open the following pop-up.
Following are the data fields in this pop-up.

- **Vendor**: Will display the ID of the vendor
- **Delivery Schedule**: Will display the date and time-stamp till which the order has to be submitted.
- **Order Date**: Displays the date on which the order has to be created
- **Order Status**: Will display status of the order object. Will be blank if order not created yet.
- **Amount**: Will display the total dollar amount of the ordered items. Will be blank if order not created yet.

**Actions:**

Clicking this icon will create the Order object and take the user inside that object. The user will make required changes and then save and close the object which will again bring them to the workflow. If the order is already created, as in the case above, then this button will take the user inside the object if he needs to make any changes.

Once the order has been created and submitted, the task will turn green. The progress bar will now display (5/8).

**Inventory**: This task will be in red color if the inventory is un-posted. If the inventory is posted, this task will already be green.
Once the previous inventory object is posted, the task will turn green and the progress bar will read (6/8).

Violation Dashboard
This task will display a report which will give the details of all employees who have breached any labor law defined at the Org level within that week. If no employee has breached any labor law, this task will already be green.

The difference between the task in 1st and 2nd shift will be that, if an employee breaches any labor law after the first shift has already been completed, then that employee’s information will be reflected. Clicking this task will display the Figure 4.67

Following are the data fields in this pop-up.
- **Employee Number**: Will display the GEID of the employee
- **Employee Name**: Will display the employee’s first and last name
- **Total Hours**: Will display the total hours worked by the employee in that week.
• **Normal Hours**: Will display the total normal hours (less than the defined OT hours) worked by the employee in that week.
• **OT Hours**: Will display the total overtime hours worked by the employee in the week so far.
• **Actual**: Will display the actual punch of the employee in the current day’s timekeeping.
• **Schedule**: Will display the scheduled hours of employee for current day. Will be blank if employee not scheduled.

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**Notes**

The columns with colored marks depend on the laws defined at the Org: The green mark represents that the employee has not breached that particular law. The yellow mark in Approaching OT represents that the employee has worked for than 30 hours in the week and is close to breaching the OT mark. The red mark represents that the employee has breached that particular law.

**Actions:**

✅ Clicking this icon will mark this task as complete, implying that the task has been reviewed and the icon changes to You’re Done as shown in the screenshot below.

![Employee Violations Dashboard](image)

**Figure 4.68**: Icon changes to You’re done

Once the task has been reviewed, the task will turn green.
Punch Exception

This task will be red if there are any unresolved punch exceptions present in the current payroll from the start of the payroll period till the current date.

This task is exactly similar in nature to the Previous Punch Exception already explained in Start of Day. The only difference is that Previous Punch Exception does not show any punch exceptions of the current day even if they have already been polled into the application. The current day’s punch exceptions will only be shown in the Punch Exception task in Close of Day. The only difference will be in the Open Punch exceptions, as shown in the Figure 4.70.

The last column in the above pop-up is **On The Clock**. This feature is only available in the Punch Exception task in Close of Day shift.

This feature has been given for the following scenario:
An open punch is polled into the application because the employee is still working at the store. The user operating on the workflow cannot complete the current day until all punch exceptions are resolved. In this case, he would have to wait for the final store file to be polled which will contain the Clock Out time of the employee.
In order to avoid this, **On The Clock** feature has been provided which removes the punch exception from the current day and will shift it to the Previous Punch Exception task of next day. This will enable the user to complete today’s workflow without waiting for the final store file to be polled.

The next morning, the user can login and validate whether the punch has been completed by the store file, otherwise he can resolve the punch himself.

Once the user clicks **On The Clock** button, the open punch will be removed from the punch exception task and the number of punch exceptions will be reduced by 1.

After resolving all punch exceptions as already explained, the task color will turn to green and the progress bar will display (7/8).

![Figure 4.71: Progress bar status changes](image)

### 4.2.2.9 Review Punches

This task displays all the punches of the current day’s timekeeping object. If the current day’s timekeeping object has not been created, the task will already be green.

To complete this task, the user needs to review the punches which will be done through a button provided at the top right of this task.

Clicking this task will open up the following window.
**Actions:**

- **Clicking this icon** will mark this task as complete, implying that the task has been reviewed and the icon changes to You’re Done as shown in the screenshot below.

- **Clicking this task** will generate a PDF report of the punches.

User can add a new punch to the current timekeeping object by clicking on this icon.

Once the task is completed, the task color will turn green and the progress bar will display (8/8).
Technically, the workflow is now complete and the user can move ahead to the next day’s workflow once the current business day has passed. This is because all the mandatory tasks of the current day have been completed.

**Review Extra Pay**

This task will display all extra pay records from the start of the payroll period till the current date which have not yet been reviewed by the user.

Clicking this task will display the following window.

![Figure 4.75: Review Extra Pay Screen](image)

**Actions:**

- **Checkmark:** Clicking the Edit icon will mark this task as complete, implying that the task has been reviewed and the icon changes to You’re done.

![Figure 4.76: Icon changes to You’re done](image)

- **Printer:** Clicking the Print task will generate a PDF report of the extra pay records
- **Add Extra Pay:** Clicking the Add Extra Pay icon allows user to add an extra pay record by clicking this icon

This task is exactly similar in nature to the **Review Extra Pay** already explained in Start of Day. The only difference is that the task in Start of Day will not show any extra pay records of the current day even if they have already been added. The current day’s Extra Pay records will only be shown in the Review Extra Pay task in Close of Day.
Approaching OT Report

This task displays the details of those employees who have worked for more than 30 hours in the current week.

Clicking this task will display the following report.

If any employee has breached the 30 hour mark after the Approaching OT task has been completed in the first shift, then that employee’s details will be displayed in the second shift.

Actions:

- Clicking the Mark as Complete icon will mark this task as complete, implying that the task has been reviewed and the icon changes to You’re done.
Figure 4.79: Icon changes to You’re done

Clicking the Report icon will generate PDF format of the same report.

Figure 4.80: Approaching Alert Icon turns Green and Progress bar status remain same

This marks the completion of the workflow for one complete day.

Figure 4.81: Workflow completed of one Day
Special Scenarios in Start of Day and Close of Day

Scenario 1: Start of Day on 1st Day of Payroll

Two additional tasks will be present in the Payroll Module on the workflow of the first day of payroll. These tasks will display the data of the previous payroll object. These objects will not be present if the previous payroll does not exist.

The progress bar will display (6/8) as now there will be eight (8) mandatory tasks on the workflow.

**Previous Payroll Hours:** This task will display the punches of the previous pay period, employee wise. It displays only on first day of new payroll period.

The user can click the employee name which will open another pop-up displaying the date wise punches of the employee (as shown in Figure 4.84).
The user can click the date hyperlink which will open up the punch detail from where the user can either modify the punch by clicking the **Update Punch** or delete it by clicking the **Delete Punch** button (as shown in Figure 4.85).

**Actions:**

- Clicking the Mark as Complete icon will mark this task as complete, implying that the task has been reviewed and the icon changes to You're done.
Previous Payroll Summary: This task displays the summary of the complete payroll object. This task will be displayed as red only if the previous payroll object is un-posted. If the previous payroll object is already posted, this task will turn green if all the other Payroll module tasks on the workflow have been completed.

Clicking this task will show the following window.

Following are the data fields in this pop-up:

- **Date**: Will display the start date of the payroll object
- **Store**: Will display the store ID number and name
- **Total Hours**: Will display the total hours of the payroll period
- **Total Pay**: Will display the total pay of the payroll period
- **Normal Hours**: Will display the total normal hours (non-OT/DT hours) of the payroll period
- **OT Hours**: Will display the total over-time hours of the payroll period
- **DT Hours**: Will display the total double time hours of the payroll period
- **Extra Pay Hours**: Will display the total extra pay hours of the total pay period
- **View Details**: Will display a hyperlink to navigate into the payroll object

On clicking the Icons, user will be navigated into the payroll object from where the payroll object can be submitted and the task can be completed.
Once the above 2 mandatory tasks get completed, the first shift will be complete and the same will be displayed in the progress bar (8/8) (as shown in Figure 4.89).

Scenario 2: Close of Day on Last Day of Payroll Period

Two additional tasks will be present in the Payroll Module on the workflow of the last day of payroll. These tasks will display the data of the current payroll object. These objects will not be present if the current payroll does not exist. The progress bar will display (8/10), as now there will be ten (10) mandatory tasks on the workflow.

**Review Hours**
This task will display the punches of the previous pay period, employee wise.
The user can perform the same actions on this task as described in the Previous Review Hours task. While the behavior of task will be the same, the data will be different as Review Hours task will display timekeeping data of current payroll period. Once the task is made Mark as complete that means the task is reviewed and completed. Also the icon will change to You’re Done as shown in the figure 4.93.

Payroll Summary
This task will display the summary of the complete payroll object. This task will be displayed as red only if the current payroll object is un-posted. If the current payroll object is already posted, this task will turn green if all the other Payroll module tasks on the workflow have been completed.

The functioning of this task will exactly be similar to Previous Payroll Summary task already described, only the data will be different.

Once both these tasks get completed, the workflow for the current day will be completed and user will be able to move on to the next day when the business date will change.
Exceptional Cases

Some exceptional cases will also be handled in My Workflow to make it more effective from task management point of view. This section contains the detail about such cases.

**Case 1:** If any mandatory task (shift level or day level) of previous business day have not been completed yet the business date has changed.

Screen shown in Figure 4.94 will be displayed in this case and user will need to complete the pending task for previous day. Without completing the pending task, user will not be able to continue with workflow for current business day.

**Case 2:** If current business day is a close day then the following message will be displayed on the My Workflow screen. This day will automatically be marked as complete and the user will not face any problem in going to the next day’s workflow.
Business day 01/05/2016 is a close day thus all tasks have been marked as complete automatically.

**Figure 4.95**: Message appears when Current Business Day is a Close Day